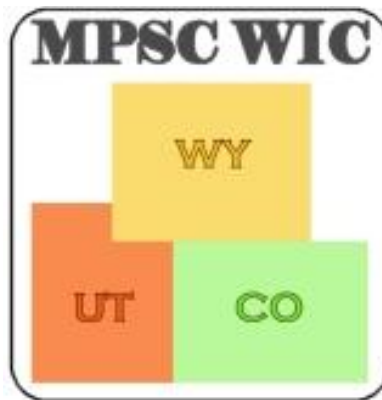

Mountain Plains States Consortium WIC System Project

DDI DELIVERABLE #07

SC 0 SCHEDULER OVERVIEW DFDD

(DETAILED FUNCTIONAL DESIGN DOCUMENT)

Presented to:



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1 Introduction

The purpose of the Clinic Services Scheduler is to provide local agencies and clinics the ability to create and maintain various types of appointments for families in the WIC program. WIC appointments, Nutrition Education classes, and non-WIC appointments appear on the clinic schedule.

The Master Schedule screens (accessed via System Administration) are used to set up the clinic's working hours and available staff. See the SA Scheduler Screens DFDD for more information on establishing the clinic working hours and staff.

Scheduler also integrates with an auto-dialer system. At the clinic level, it is determined whether or not an auto-dialer is used. If a clinic uses an auto-dialer, then WIC appointments and Nutrition Education classes are available for the call file.

1.1 Interaction Between Scheduler and Clinic Services

The Scheduler and Clinic Services modules of the WIC system work closely together. Users frequently work with a family in Clinic Services and move directly to Scheduler to set up appointments for family members. Likewise, users working in Scheduler can search for and retrieve families to schedule for appointments or nutrition education classes.

The following business rules describe how the WIC system handles interaction between the Scheduler and Clinic Services:

- If a user is viewing a family in Clinic Services and goes to Scheduler to view that family's appointments, that same family remains in view when the user returns to Clinic Services.
- If the user is viewing an existing family in Clinic Services, that family appears in the recent families list if the user switches to the Scheduler. Users can then use the recent families list to select that family for an appointment. (Users also have the option to search for a different family for an appointment.)
- Scheduler does not allow the user to make an appointment for a new family until that family is saved in Clinic Services.
- The schedule of a disconnected clinic is locked during the hours the disconnected clinic is in session so that no connected PCs can schedule to that clinic while it is in session.

2 Navigation Panel

The Navigation Panel contains:

- Navigation buttons stacked starting from the bottom of the panel.
- Multiple calendars.

2.1 Navigation Buttons

The navigation button labeled "Scheduler" allows the user to access the Scheduler functional area.

When the user clicks on the Scheduler navigation button,

- Navigation Panel contains multiple calendars. See the Multiple Calendars section in this document for more details.
- Main Panel contains the Appointment Calendar for the current day. See the Main Panel section in this document for more details.
- Information Panel displays the System tab by default.

2.2 Multiple Calendars

The Multiple Calendars is a graphic representation of calendar months. The first month displayed is the current month (with the current day highlighted inside it). The next months follow. The number of months displayed is dependent on the user's screen resolution. The user selects days in these months to determine which day's Appointment Calendar is shown in the Main Panel. The user can also navigate to other months using the month spin control or the year spin control. The Today button at the bottom of the Multiple Calendars can be selected to revert to the current day's Appointment Calendar.

Scheduler

July 2007

S	M	T	W	T	F	S
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

August 2007

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

September 2007

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Today

2.3 Saving Work

The Scheduler area saves units of work at the appointment level.

3 Main Panel

This panel is where all the screens described in the remaining Scheduler DFDDs are displayed.

4 Information Panel

The Information Panel contains two tabs. The first is entitled "Messages" which contains warning and error messages associated with the main panel screen. The second is entitled "System" which contains active "System Wide" and "Scheduler" type system messages. These are described in the System Overview DFDD.

5 Menu Bar

The Scheduler Menu Bar is visible at all times and is found at the top of the screen.

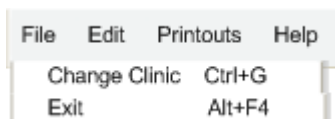


File Edit Printouts Help

Control	Description	
File	Select File to display File menu options. See File Menu section for more information.	
	Type	Menu Item
	Hot Key	Alt + F
Edit	Select Edit to display Edit menu options. See Edit Menu section for more information.	
	Type	Menu Item
	Hot Key	Alt + E
Printouts	Select Printouts to display the options for which a user can print the clinic schedule for a particular day. Note: These are not participant notices. These are UI outputs related to the scheduler. <ul style="list-style-type: none">• Daily Calendar• Clinic Roster	
	Type	Menu Item
	Hot Key	Alt + O
Help	Select Help to display Help menu options. See Help Menu section for more information.	
	Type	Menu Item
	Hot Key	Alt + H

5.1 File Menu

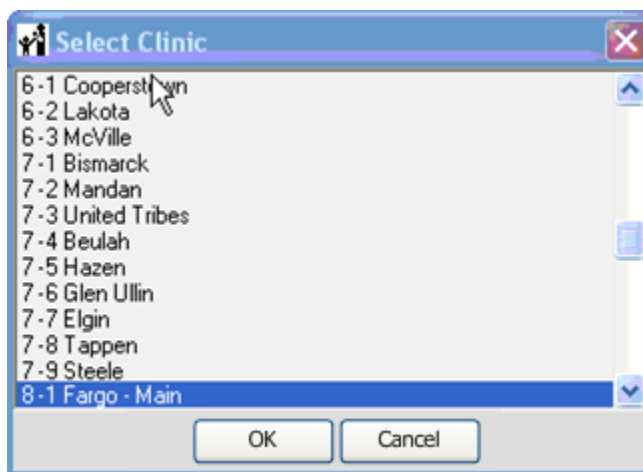
The File menu is visible at all times, giving access to common File functions.



Control	Description	
Change Clinic	Select Change Clinic to select a different clinic.	
	Type	Menu Item
	Hot Key	Ctrl + G
Exit	Select Exit to exit the application.	
	Type	Menu Item
	Hot Key	Alt + F4

5.1.1 Change Clinic

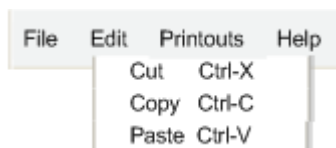
This pop-up is used to change the clinic that the user is logged onto. At user logon, the user selects a clinic. The access for the user is based on the clinic.



Control	Description			
unlabeled	The unlabeled data grid within the Select Clinic pop-up allows the user to select another clinic. The user sees clinics that they have access rights to see. The user highlights the clinic that they want to go to and clicks the Close button.			
	Type	Read-Only Data Grid		
	Display	Yes		
LA-Clinic number	This is the local agency-clinic number.			
	Format	Z9-ZZZZ9	Calculated	No
Clinic name	This is the name of the clinic.			
	Format	Alphanumeric	Calculated	No
OK	Clicking the OK button changes the clinic and returns the user back to the main application.			
	Type	Command Button		
	Hot Key	Alt + O		
Cancel	Clicking the Cancel button returns the user back to the main application.			
	Type	Command Button		
	Hot Key	Alt + L		

5.2 Edit Menu

The Edit menu is visible at all times, giving access to editing functions.

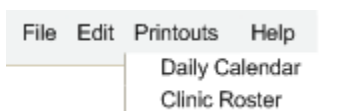


Control	Description	
Cut	Select the Cut menu item to remove selected text to paste it to another location.	
	Type	Menu Item
	Hot Key	Ctrl + X
Copy	Select the Copy menu item to create a copy of selected text to paste it to another location.	
	Type	Menu Item
	Hot Key	Ctrl + C

Control	Description	
Paste	Select the Paste menu item to place text cut or copied in the selected location.	
	Type	Menu Item
	Hot Key	Ctrl + V

5.3 Printouts Menu

The Printouts menu is visible at all times, giving access to printouts associated with the scheduler.



Control	Description	
Daily Calendar	Select the Daily Calendar menu item to print the daily calendar for the calendar day that is currently displayed in the calendar.	
	Type	Menu Item
	Hot Key	None
Clinic Roster	Select the Clinic Roster menu item to print the clinic roster for the calendar day that is currently displayed in the calendar.	
	Type	Menu Item
	Hot Key	None

5.3.1 Daily Calendar

The Daily Calendar is a UI Output that shows the clinic calendar like it is shown on the screen. The user selects columns and dates to print based on the Page Setup dialog box that is part of the calendar control. (The Page Setup Dialog box is part of the purchased calendar control. No customization is available for this dialog box. Refer to Page Setup for more information about this dialogue box.) The Local Agency-Clinic number and name and the date are at the top of the output. This UI Output would allow for paper scheduling if clinic flow or staffing requires. The minimum appointment durations and the way that the clinic schedules appointments dictates how much of the information about an individual appointment can be seen. For a WIC appointment, where there is space within the appointment period, the endorser's name, the appointment type, the participant's names, and the appointment notes are displayed. For Nutrition Education Class Appointments or Non-WIC Appointments, only the name of the class or appointment is indicated.

Note: Because the printing of the calendar is a function of the purchased calendar control, this UI output is not available for state customization through System Administration.

5.3.1.1 Language: English

The daily calendar is available in English only.

5.3.1.2 Daily Calendar Mockup

30 July 2007

Monday

July 2007							August 2007						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7				1	2	3	4
8	9	10	11	12	13	14	5	6	7	8	9	10	11
15	16	17	18	19	20	21	12	13	14	15	16	17	18
22	23	24	25	26	27	28	19	20	21	22	23	24	25
29	30	31					26	27	28	29	30	31	

	Suzy Smith	Jennifer Jenkinson	Ally Allwein	Barbara Braddock	Melinda Miller	General
	Monday, July 30	Monday, July 30	Monday, July 30	Monday, July 30	Monday, July 30	Monday, July 30
Mountain						
8 AM						
9:00	Open Cert Slot	Open Cert Slot	Works half day	Wendy Hutchinson Cert - Hutchinson, Suzy HR Hutchinson, Cory	Peterson, Pamela Cert - Peterson, Pamela HR Peterson, Penny Peterson, Dateu	Breastfeeding Basics Scheduled 2 of 15
10:00	Open Cert Slot	Open Cert Slot		Miller, Belinda Recert - Miller Belinda	Dentist Appointment	
11:00	Open Cert Slot	Open Cert Slot		Kingsley, Ben Cert - Mallory, Ana		
12 PM	Open Cert Slot	Open Cert Slot		Anderson, Eloise Cert - Anderson, Eloise	Grahmn, Elsie Recert - Graham, Elsie	
1:00	Lunch	Lunch	Open Cert Slot	Lunch	Lunch	
2:00			Open Cert Slot	Erhart, Emily Cert - Erhart, Emily	White, Alexis Recert - White, Alexis MD, PhD	Healthy Cooking Scheduled 2 of 8
3:00			Open Cert Slot	Gerhardt, Jenna - Recert Gerhardt, Jenna	Moore, Mandy Cert - Moore, Mandy Jones, Brennan	
4:00			Open Cert Slot	Anderson, Rose Recert - Anderson, Rose Anderson	Patel, Shagira - Cert Patel, Purvi Patel, Rema	
5:00				Gates, Melinda Cert - Torres, Anthony		

Business Rules

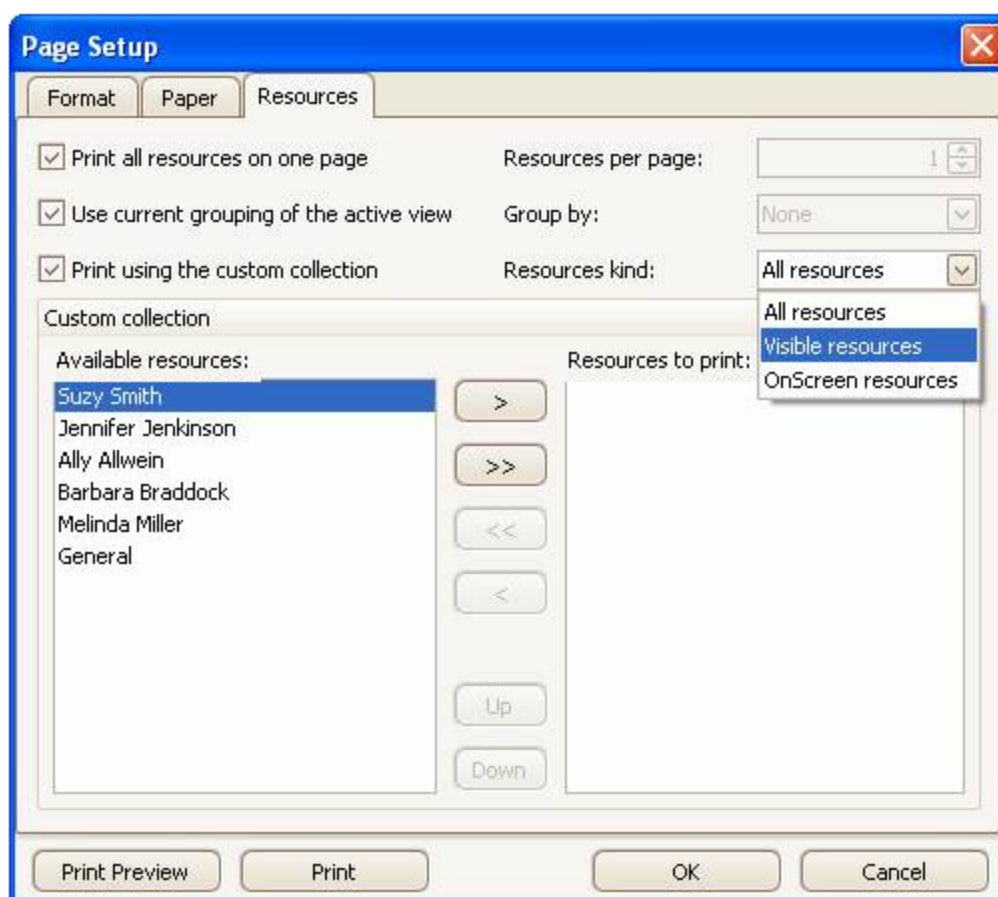
1. This UI output is landscape.
2. Page numbering in the output should appear in the footer-right in the format "Page x of y".
3. For WIC appointments, print the following information (Appointment.Subject):
Endorser Last Name, Endorser First Name
Appt Type code – Participant Last Name, Participant First Name, Indicators HR, IN and SN as needed.
(additional participants listed below) OR
Open Slot if no participant yet associated with the time slot.
4. For NE appointments, print the following information (NutritionEdClass table lookup (Name field) and Appointment.BFam_ID and Appointment.UpdatedMaxStudentNr):
Class title
Scheduled 99 of 99
5. For Non-WIC or Personal appointments, print the following information (Appointment.Subject):

Business Rules

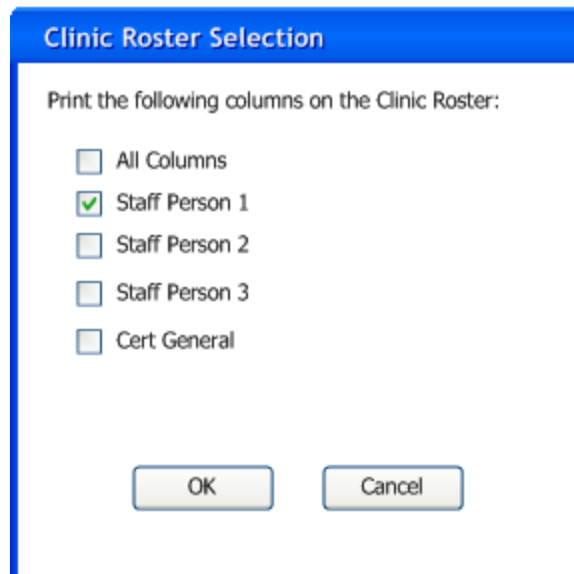
Subject of the appointment (Appointment.Subject)

5.3.2 Page Setup

The Resources tab of the Page Setup dialogue box is used to select the columns that are printed on the Daily Calendar. As a part of the purchased calendar control, no customization will occur with this dialogue box. Resources are equal to columns in the calendar. The user has the ability to print all resources (columns) on one page or define how many resources (columns) per page, print only the resources (columns) that are currently in view on the calendar, or print the resources (columns) selected through the custom collection data grid.

**5.3.3 Clinic Roster Selection Pop-Up**

The Clinic Roster Selection Pop-up allows staff to select specific columns to print on the Clinic Roster.



Clinic Roster Selection

Print the following columns on the Clinic Roster:

☐ All Columns
☒ Staff Person 1
☐ Staff Person 2
☐ Staff Person 3
☐ Cert General

OK Cancel

Control	Description			
Print the following columns on the Clinic Roster: - All Columns	Checking this checkbox checks all subsequent check boxes in the pop-up. This allows all columns to print on the Clinic Roster.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	Not Stored		
Print the following columns on the Clinic Roster: - (additional check boxes)	Checking this checkbox allows the printing of that specific column on the Clinic Roster.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	Not Stored		
OK	The OK button allows the printing of the Clinic Roster with the appropriate columns.			
	Type	Command Button		
	Hot Key	Alt + O		
Cancel	The Cancel button returns the user to the WIC Clinic Schedule.			
	Type	Command Button		
	Hot Key	Alt + L		

Business Rules

1. Display all active columns on the schedule for the day specified.
2. Display an error message if no check boxes are marked and user clicks OK.

Developer Notes

- 1.

5.3.4 Clinic Roster

The Clinic Roster is often printed out ahead of the clinic day and used for a call reminder listing or for clinic preparation. This may also be printed if there is suddenly a need to cancel a number of appointments. It is likely that rescheduling will occur when the family next contacts the WIC office or when a rescheduled day is established. The clinic roster is sorted by the Appointment Time.

5.3.4.1 Language: English

The clinic roster is available in English only.

5.3.4.2 Clinic Roster Mockup**Clinic Roster**

1-31 River Plaza
October 30, 2007

Appt Time	Participant Name	Person ID	DOB	Endorser Name	Family Phone	Appt Type	Column	Preferred Lang	Indicators	Notes	Result	Response
9:00 AM	Heather Musser	654123	10/13/1985	Heather Musser	(303) 555-7979	Certification	ColumnA	Spanish	IN		Answered	Confirmed
9:00 AM	Cora Musser	447890	5/30/2005	Heather Musser	(303) 555-7979	Follow-up	ColumnA	Spanish	HR, IN		Answered	Can't Attend
9:30 AM	Carol Danner	423245	5/20/1980	Carol Danner	(303) 555-4477	Certification	ColumnB	English		interested in breastfeeding instruction	No Answer	No Response
10:00 AM	Lisa Joyoe	441225	7/15/2005	Marianne Joyoe	(303) 555-9878	Certification	ColumnA	English			Answered	Confirmed
10:00 AM	Daniel Mitchell	789789	12/20/2004	Alicia Mitchell	Do Not Call	Recertification	ColumnA	English	HR		No Call	No Response
10:00 AM	Gabriel Nunez	434556	10/31/2005	Celia Nunez	(303) 555-9283	Certification	ColumnB	Spanish	IN		Answered	Confirmed
10:00 AM	Lola Nunez	159169	10/25/2007	Celia Nunez	(303) 555-9283	Certification	ColumnB	Spanish	IN		Answered	Confirmed
1:00 PM	Laura Bennett	369369	11/18/1987	Laura Bennett	(303) 555-4697	Certification	ColumnA	English	HR		Answered	Wrong Number
1:30 PM	Regina Sloan	456456	12/17/2005	Anne Sloan	Do Not Call	Follow-up	ColumnB	English			No Call	No Response
2:00 PM	Peter Robinson	789789	10/19/2006	Sally Robinson	(303) 555-1235	Certification	ColumnA	English			Ans Machine	No Response
2:30 PM	Maya Clark	664554	4/21/1988	Maya Clark	(303) 555-6789	Follow-up	ColumnB	English			Answered	Confirmed
3:00 PM	Rhonda Peterson	335779	6/22/1989	Rhonda Peterson	(303) 555-6678	Follow-up	ColumnB	English	HR		Answered	Confirmed
3:00 PM	Dana Andrews	776449	7/28/1985	Dana Andrews	(303) 555-7538	Certification	ColumnA	English			Busy	No Response
3:00 PM	Anh Duong	554881	6/5/1987	Anh Duong	(303) 555-6642	Certification	ColumnA	Vietnamese	IN, SN		Answered	Confirmed
3:00 PM	Martha Hill	441332	2/14/1992	Martha Hill	Do Not Call	Nutrition	ColumnA	English			No Call	No Response
3:00 PM	Amanda Hill	156678	8/15/2007	Martha Hill	Do Not Call	Nutrition	ColumnA	English			No Call	No Response
3:30 PM	Oliver Wyatt	357483	7/6/2007	Sheila Wyatt	(303) 555-3346	Follow-up	ColumnB	English	HR		Answered	Can't Attend

Business Rules

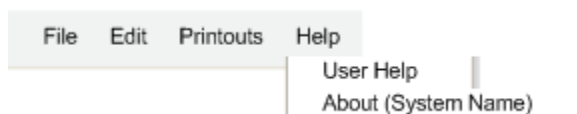
1. This UI output is landscape.
2. Page numbering in the output should appear in the footer-right in the format "Page x of y".
3. Print the columns selected in the Clinic Roster Selection pop-up.
4. LA-Clinic header = Clinic.LA_ID, Clinic.FFCLinicID
5. Clinic Date = ClinicSchedule.Date
6. Appt Time = Appointment.StartTime
7. The participant name is
FamilyMember.FirstName+FamilyMember.MiddleName+FamilyMember.LastName+FamilyMember.LastNameSuffix

Business Rules

8. Person ID = FamilyMember.FFMemberID
9. The endorser name is
FamilyMember.FirstName+FamilyMember.MiddleName+FamilyMember.LastName where
FamilyMember.ParentGuardianIn = "Y"
10. Family Phone = BenefitFamily.HomePhoneAreaCd +
BenefitFamily.HomePhoneNr, Display as (999) 999-9999
Note: If BenefitFamily.DoNotCallIn = Yes, then display "Do Not Call" instead of the
phone number.
11. Appt Type = Appointment.AppointmentTypeCd (WIC Appointments only, no Nutrition
Education Class Appointments)
12. Column = AppointmentColumn.MSC_ID
13. Preferred Lang = BenefitFamily.SpokenLanguageCd
14. Indicators = RiskHeader.HighRiskIn, FamilyMember.SpecialNeeds +
BenefitFamily.NeedInterpreterIn, Participant.MiscarriageIn
15. Notes = Appointment.Note
16. Result and Response columns are present on the UI output only if the
CClinic.AutoDialerIn is marked on the Clinic Details screen.
17. Result = Appointment.AutoDialResult
18. Response = Appointment.AutoDialResponse

5.4 Help Menu

The Help menu is visible at all times, giving access to user help and system version information.

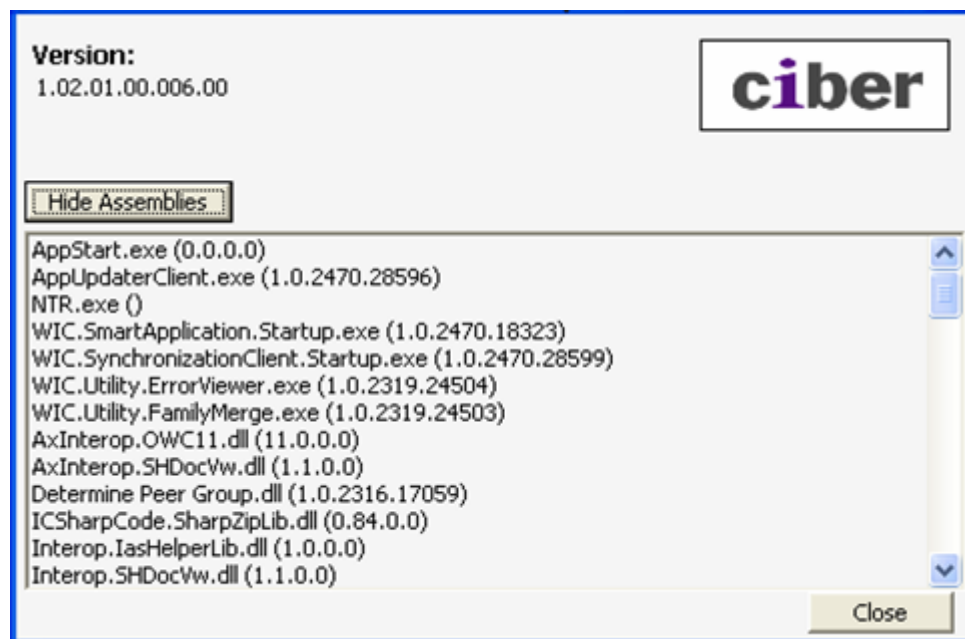



Control	Description	
User Help	Clicking the User Help menu item allows the user to view the current version of the application user help. This opens a Help window as described in the System Overview DFDD.	
	Type	Menu Item
	Hot Key	None
About (System Name)	Clicking the About (parameter) menu item allows the user to view version and system information.	
	Type	Menu Item
	Hot Key	None

System Parameter	Purpose	Format
System.SystemName	Provide identification of the system.	Character

5.4.1 About (System Name) Pop-up

This pop-up provides the user with the version number of the application and allows for assemblies to be viewed as needed.








Control	Description			
Version	The version number that is displayed shows the version of the application that is currently being used (as defined in system parameter).			
	Type	Text Box		
	Required	Yes		
	Length	13		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	SystemParameter.Character		
	The CIBER logo appears for branding purposes. This is the company that developed the application.			
	Type	Text Box		
	Required	Yes		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NA		
Show Assemblies/Hide Assemblies	By default, the About (System Name) Pop-Up displays the version number of the application. Clicking the Show Assemblies command button displays system assemblies. Clicking the Hide Assemblies command button returns to the default view.			
	Type	Command Button		
	Hot Key	Alt + M		
Close	Clicking the Close command button closes the About (system name) pop-up and returns the user to the Clinic Services screens.			
	Type	Command Button		
	Hot Key	Alt + C		




System Parameter	Purpose	Format
System.SystemVersion	The version number of the system. Format is X.XX.XX.XX.XXX.XX.	Character

6 Tool Bar

The Scheduler Tool Bar is visible at all times, giving access to frequently used functions and screens.



Control	Description	
	Clicking this Save icon saves any changes that were made on the current screen to the database.	
	Type	Command Button
	Hot Key	None
	Clicking this New Appointment icon shows a pop-up where the user selects an appointment type and then shows the type of appointment editor pop-up that is appropriate for the appointment type selected.	
	Type	Command Button
	Hot Key	None
	Clicking this Find Open Appointment icon opens the Find Open Appointment Slot pop-up as specified in the SC 1 Scheduler – Appointment Screens DFDD. The most recently viewed family's Family Preferences appear by default in the Find Open Appointment Slot pop-up. If no family was recently viewed then family information is not shown. The Find Open Appointment Slot pop-up selection criteria also displays.	
	Type	Command Button
	Hot Key	None
	Clicking the arrow of this Change Clinic icon allows the user to change the clinic's schedule that is shown.	
	Type	Command Button
	Hot Key	None
	Clicking this Refresh icon refreshes the displayed schedule. A timer is found to the right of the icon which displays the amount of time since a refresh was done. After the number of minutes in the system parameter, Scheduler.RefreshMinutes, the time turns red and a reminder informational message is placed in the Messages tab in the Information Panel.	
	Type	Command Button
	Hot Key	None

Control	Description	
	Clicking the arrow of this Recent Family icon allows the user to access a recent family by selecting from the list of 10 most recently accessed families.	
	Type	Command Button
	Hot Key	None
	Clicking this Income Guideline icon will display the Income Guideline pop-up screen.	
	Type	Command Button
	Hot Key	None
	Clicking this Income Calculator icon displays the income calculator pop-up. See the Income Calculator section of the CS Family Intake Screens DFDD for information on the income calculator.	
	Type	Command Button
	Hot Key	None

System Parameter	Purpose	Format
Scheduler.RefreshMinutes	This controls the number of minutes until the user is notified that they should refresh the daily schedule.	Integer